

Storyboard

Private Provider Monthly Summary Entries and ICD-10 Codes

This storyboard demonstrates how to enter a Monthly Summary and document ICD-10 codes. Monthly Summaries show up in Case Recordings only when marked 'Completed'.

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Private Provider Monthly Summary Entries

Viewing Workload Screen

- Home Screen
- Workload tab
- Viewing Worker box: System defaults to the name of the person logged into the system
- Viewing for: Lists the workload currently being viewed
- Supervises section: Will see list of all personnel being supervised
- Field Grid: Current log in viewing of Private Provider's Work Item assignments



Viewing the Provider Monthly Summary Icon

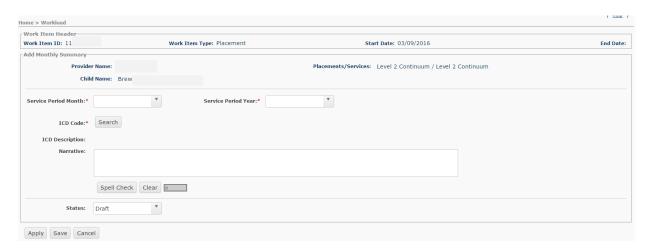
- From **Ongoing** Case
- Click the Monthly Summary icon to navigate directly to the Monthly Summary page



• The paper icon is associated with the "Provider Monthly Summary". If you hover over the icon, a "Provider Monthly Summary" pop up label is visible. If previous Summaries have been entered, you can access and read them via this icon.

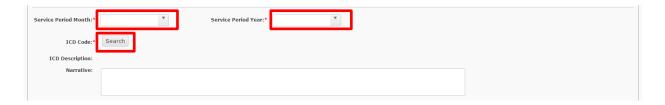
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• You are automatically directed to the Add Monthly Summary.



- **Service Period Month*** required field. Choose the month from the dropdown.
- **Service Period Year*** required field. Choose the Year from dropdown.
- ICD Code*: Click Search to identify the correct ICD code.

Below shows how the screen will look.



Entering the ICD Code

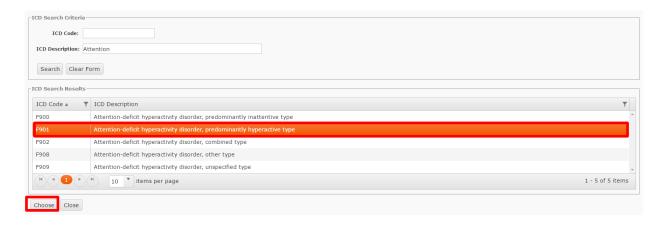
The steps to entering an ICD code will be the same as previously outlined until you get to the ICD Code Search step.

- Enter ICD Code if known OR
- Enter ICD Description in box
- Click Search.



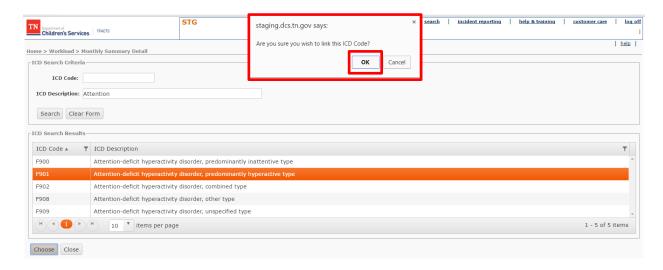
All ICD codes will display containing the ICD description entered.

- Determine which code is correct.
- Click on the correct code and it will highlight the row.
- Click Choose.



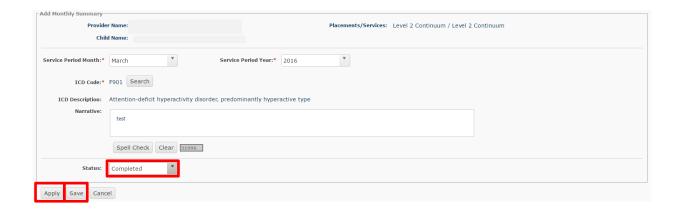
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- A pop up message "Are you sure you wish to link this ICD code?" will display.
- Click OK.



The screen below displays a 'Completed' Monthly Summary entry after the ICD-10 codes go into effect.

- **Note:** *The Status cannot be 'Completed' unless the Narrative field is populated.
- Note: *You cannot print Monthly Summaries unless they are in the 'Completed' status.
- **Status**: Choose 'Completed' if the Monthly Summary entry is completed.
- Click Apply to remain on the Add Monthly Summary page to review your entry, OR
- Click Save, which will navigate you back to your Workload page.



Monthly Summary Status List

- Monthly Summary's that have been previously started -'Draft' or any that are marked 'Completed' will display, as well as 'Created in Error' will display.
- Monthly Summary's will only be saved as a Case Recording when they've been marked as 'Completed'

'Draft' Status

The screen shot below displays a Monthly Summary record in 'Draft' status.

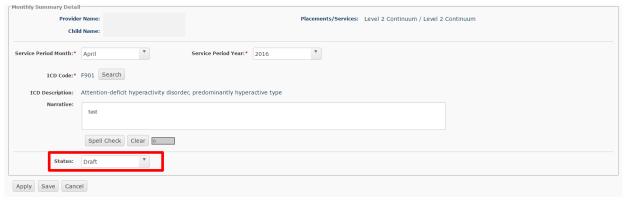


Making updates to a Monthly Summary in 'Draft' status

- On the Monthly Summary List page, click on the Monthly Summary you wish to review or update, it will be highlighted.
- Click Select.

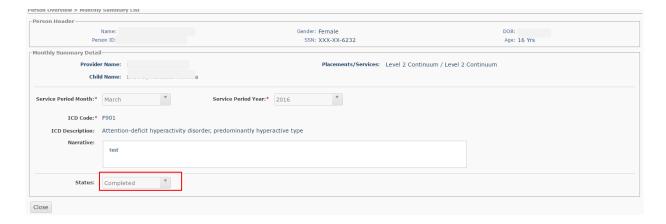


Note: The screen shot below displays the updated Monthly Summary record again saved in 'Draft' status.



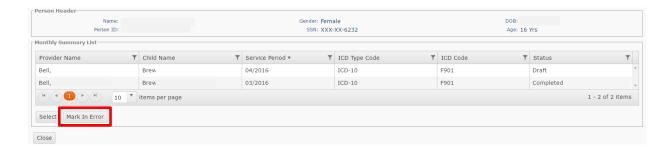
'Completed' Status

- Below is a screen shot of a Monthly Summary record that is in 'Completed' status.
- Note: It is no longer editable.
- Note: This will now show up in Case Recordings because it is marked 'Completed'.
- Note: To print- the entry will display in Case Recordings for printing.

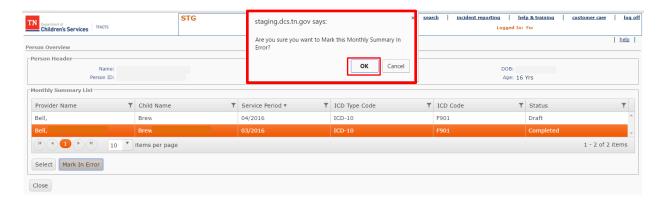


'Created in Error' Status

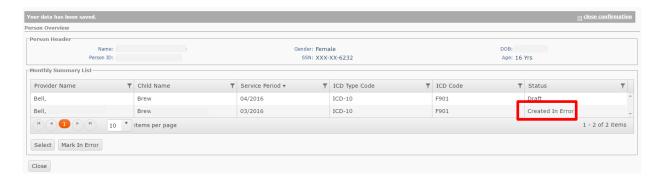
- If a Monthly Summary needs to be 'Marked in Error', click the 'Mark in Error' button.
- Only Monthly Summaries in a 'Completed' status can be marked in error.



- When marking a Monthly Summary record in error, TFACTS will display a warning message stating, 'Are you sure you want to Mark this Monthly Summary in Error?'
- Click **OK** if you are sure you want to mark the Monthly Summary record in error. If not, click Cancel.

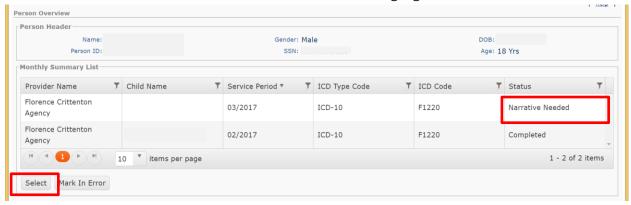


• Immediately upon clicking OK, TFACTS changes the status of the Monthly Summary record to 'Created in Error' and subsequently marks the Case Recording 'Created in Error' as well.

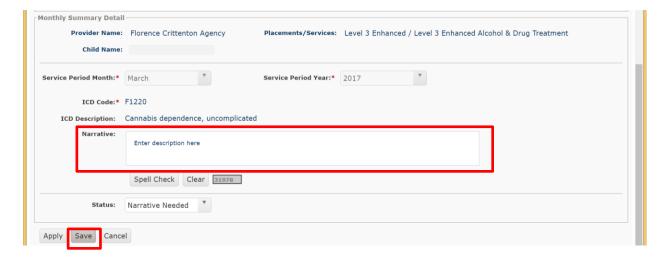


"Narrative Needed" status

- Narrative Needed occurs when either a monthly summary was in draft status or no
 monthly summary was present, but a payment request record was approved by DCS Central
 Office.
- In order to enter the information, click on the line to highlight, click Select



- Enter the Narrative and click **Save**
- Note: The status of Narrative Needed can't be changed



How to Retrieve a Monthly Summary

How to Retrieve a Monthly Summary via the Workload Page.

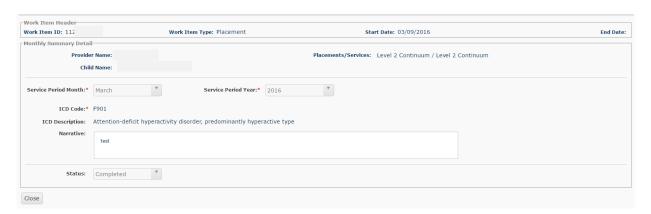
• Click paper icon to access previously existing Monthly Summary.



- Select which Monthly Summary from the Monthly Summary List by clicking on the row which will automatically highlight the chosen row.
- Click Select

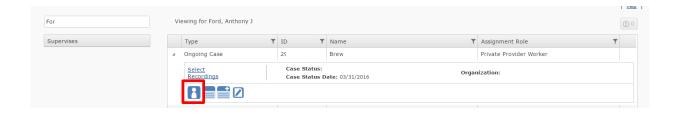


• The Monthly Summary that is selected will populate.



How to Retrieve a Monthly Summary via a Person Search

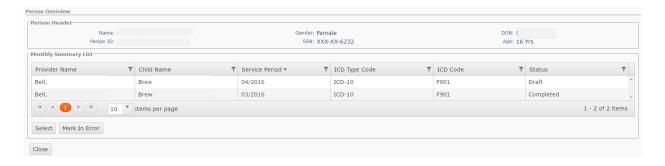
• Click on Person icon to access person profile.



• Click **Monthly Summary** link.



• The Monthly Summary list will display.



Printing Monthly Summaries

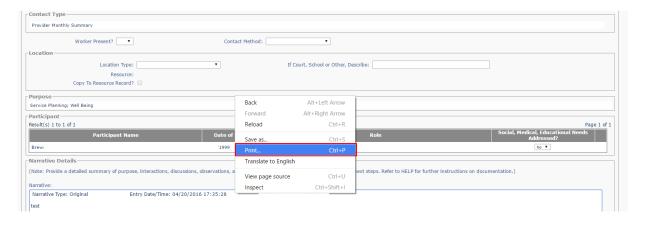
- Monthly Summary's in 'Completed' Status are available to print as a Case Recording.
- Click **Recordings** from within the case you wish to print.



 Click <u>select</u> by the Provider Monthly Summary you wish to print (must be in 'Completed' status).



- Right click on your mouse.
- Select **Print** from drop down box.



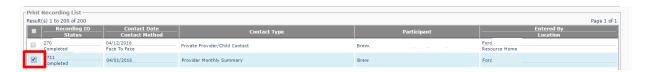
OR

• While in the Family Case, click on **Print** button



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• Check each box you wish to Print



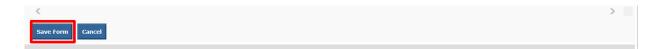
• Scroll to bottom of page and click **Generate** button.



• Click **Generate Report** button.



• Click Save Form.



You have completed this storyboard.